California Arts Council

OSP

Organizational Support Program
1998-1999 Guidelines and Application
Full Application

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California Arts Council

Purpose: The California Arts Council (CAC), a state agency, was established in January 1976 to encourage artistic awareness, participation, and expression; to help independent local groups develop their own arts programs; to promote employment of artists and those skilled in crafts in the public and private sector; to provide for exhibition of artworks in public buildings throughout California; and to enlist the aid of all state agencies in the task of ensuring the fullest expression of our artistic potential.

The Agency: The Director is the Chief Executive Officer and reports directly to the Governor. The Director and Deputy Director for Partnerships are appointed by, and serve at the pleasure of the Governor. The Director and Deputy Director manage a professional staff headquartered in Sacramento.

The Council: The appointed Council of the CAC consists of 11 members who serve four-year staggered terms. The Governor appoints nine members; the Legislature appoints two. Council members serve without salary, elect their own chair, and meet throughout the state to encourage public attendance. This body has final approval of CAC grants.

Mission: The mission of the CAC is to make quality art reflecting all of California's diverse cultures available and accessible; to support the state's broad economic, educational, and social goals through the arts; to provide leadership for all levels of the arts community; and to present effective programs that add a further dimension to our cities, our schools, our jobs, and our creative spirit.

Funding: The CAC is a taxpayer-supported agency, funded primarily from the state's annual budget process, supplemented with funds from the National Endowment for the Arts. Its grants are usually matched by foundations, individuals, earned income, government agencies, or other organizations.

Information Access: Due to the Public Records and Open Meeting Acts, applications and their attachments are not confidential and may be requested by the media and/or public. Observers may attend but may not comment on, participate in, or in any way interfere with panel meetings. Contact the CAC for meeting dates and locations.

Grants Panels: Applications are evaluated by panels of experts, recognized in their respective fields, who rank applications according to program criteria. The CAC staff provides information but not recommendations to the panel. The appointed CAC reviews panel recommendations before making final funding decisions.

Appeal Process: Appeals to CAC funding decisions must be submitted on an official Appeal Form, available from the CAC, and postmarked within 45 days of the decision. Appeals are heard only on the following grounds:

1. Assessment based on a misstatement of factual information as contained in the application such that it negatively influenced the panel's assessment of the applicant's request for funding; and/or
2. Incorrect processing of the required application materials such that it negatively influenced the panel's assessment of the applicant's request for funding.

Note: *Dissatisfaction with award denial or with award amount is not grounds for appeal.*

Requirements: The CAC is mandated both by federal and state regulations to fund only organizations that have proof of nonprofit status under sec. 501(c)(3) of the Internal Revenue Code, or under sec. 23701d of the California Revenue and Taxation Code, or entities that are a unit of government; and that comply with the Civil Rights Act of 1964, as amended; sec. 504 of the Rehabilitation Act of 1973, as amended; the Age Discrimination Act of 1975; the Drug-Free Workplace Act of 1988; California Government Code secs. 11135-11139.5 (barring discrimination); the Fair Labor Standards Act, as defined by the Secretary of Labor in part 505 of title 29 of the Code of Federal Regulations; the Americans With Disabilities Act of 1990 ("ADA"); and the Fair Employment and Housing Act.

Ownership, Copyrights, Royalties, Credit: The CAC does not claim ownership, copyrights, royalties, or other claims to artwork produced as a result of a CAC grant. However, the CAC reserves the right to reproduce and use such materials for official, noncommercial purposes. In addition, the CAC requires documentation of grant activity and appropriate credit for CAC partial support.

Table of Contents

Attention!

Panel recommendations will be forwarded to the California Arts Council for approval at its September 1998 public meeting. **Applicants will receive notice of the Council's decisions in October 1998. The contract period will begin November 1, 1998.**

Due to the volume of applications the California Arts Council receives in its various grants programs, and based on the recommendations of grant review panels, the Council has, in several grant programs, adopted policies that require funded applicants to hold their ranks for multiple years. In the 1998-99 funding cycle, the following shall apply:

- Separate deadlines have been established for Full Applications and Second-Year Reports.
- Second-Year Report materials are now printed and distributed to a target audience separate from the Full Application; these two documents are no longer distributed as one document.
- Organizations that submitted a Full Application in 1997-98 and received funding will hold their rank for two years (1997-98 and 1998-99) and will be required to submit a Second-Year Report for 1998-99 funding consideration.
- Organizations that submitted a Second-Year Report in 1997-98 and received funding will be required to submit a full application for 1998-99 funding consideration.
- Organizations that did not apply to the program in 1997-98 or who applied and were denied funding will be required to submit a Full Application for the 1998-99 funding consideration.

See discussion on page v. for further information.

The 1998-99 Organizational Support Program's Full Application has been revised slightly from previous years. The Second-Year Report is now printed as a separate document and the discipline and supplement pages have, for the most part, been significantly revised.

Please take time to familiarize yourself with the application prior to completing it. Each year, panels comment that many applicants appear not to have read the application instructions before completing the application, which is frustrating for the panelists and does a disservice to the applicant.

All organizations that wish to be considered for 1998-99 funding must submit either a Full Application or a Second-Year Report. If you submit the incorrect application (a Full instead of the required Second-Year Report or vice versa), an incomplete application, or inappropriate materials, you will not be considered for funding. There will be no exceptions.

Deadline extensions will not be granted under any circumstances. If a deadline is missed, your organization will not be considered for funding in 1998-99. Incomplete applications will not be considered for funding.

Because of staff reductions over the last several years, we are no longer able to follow-up on applications as in the past. Applications that meet the basic program eligibility requirements will be forwarded to the appropriate review panel in the condition in which they are received.

Please Read The Following Before Completing This Application!

Deadlines

Organizational Support Program deadlines have been staggered by discipline and type of application (Full or Second-Year Report). Postmark deadlines are shown on page iii.

The CAC must reject your Full Application or Second-Year report if you do not meet the deadline for the appropriate discipline. There will be no exceptions.

Application and Review Process

The Organizational Support Program operates on a two-year cycle. Grant applicants who submit a Full Application and receive funding do so for a two-year period. Funding contracts are issued separately for each year. Grant applicants receive a ranking in year one that is carried over into the second year.

However, to be considered for funding in year two, eligible applicants must complete the requirements for second-year reporting. Applicants who do not receive funding in year one may reapply in the following year. (Refer to the chart on page v. for clarification.)

We understand that the field is experiencing staff and resource shortages similar to those at the CAC. We will make every effort to answer your questions and accommodate your needs within the limitations of our resources.

It is important that your application be clear, concise, and supported by accurate fiscal information and other appropriate materials as required.

The panel's review of Full Applications and work samples is a multi-step process and involves assigning numerical ranks to an application. A four-point ranking system is used:

4 Designates an applicant as the highest priority for funding. "4" applications are considered to be "model" in stature and to meet all of the review criteria to the highest degree possible.

3 Considered good to excellent and receives funding after all "4" applications. This is a very good ranking and indicates a very solid organization that is approaching "model" status. It strongly meets the review criteria, however, some improvement or development is needed.

2 Considered to be marginally fundable. Funding, if available, may be awarded once all the "4" and "3" applications are awarded funding. These applications have some merit, however, they do not meet the criteria in a strong or solid way.

1 Not fundable under any circumstances; inappropriate for CAC support, extremely marginal in quality, etc. This application would not receive funding even if the funding were available.

Within ranking categories there is a possible "+" or "-" to indicate a greater or lesser degree of quality in the category. There is no "4+", "1+", or "1-" possible. Each ranking category and its gradations are translated into a wider numerical scale and all ranks are averaged to obtain the final ranking.

The application review process takes place in two rounds. In the initial round, the panel reviews each application and considers its merits based on the program's review criteria. Work samples (audio or visual materials) and any supplementary information is reviewed at this time.

During this initial round the panel considers the Full Applications as a pool of competitive requests for funding and discusses and ranks the applications individually; the average ranking determines funding priorities.

A fundamental discussion at the meeting allows the panel to identify and share their knowledge and observations about the applicant; the issues regarding the reasons for the ranking should come to the forefront through this method. Panelists will verbalize their rank and clearly justify the reason for their ranking.

In Round Two, ranks are averaged and clustered by rank category from highest to lowest rank. That is, all the "4s" are grouped together, all the "3s", and so on. Each ranking category is then assessed to ensure that all applicants in a cluster are equivalent to the others. In Round Two, the panel reviews categories of rankings, not individual applicants as was the case in Round One.

The panel has the authority to move up or down any applicant or number of applicants it finds to be clearly out of place in any category. The panel recommendations are then forwarded to the Council approximately two weeks prior to the public meeting, at which time review and approval occur.

Each applicant that submits a Full Application receives a CAC staff-prepared summary of the panel's discussion of their application. Panel summaries for Full Applications are mailed with the award notification letters in October 1998.

OSP

Organizational Support Program Staff:

Scott Wm. Heckes, Manager

Discipline Specialists:

Arts Services/Presenters/Arts Education..........Anne Bourget
Dance...Rob Lautz
Literature...Ray Tatar
Media Arts...Anne Bourget
Multi-Disciplinary Arts..............................Anne Bourget
Music..LeGrand Rogers
Theater...Ray Tatar
Visual Arts..Scott Wm. Heckes

Full Application POSTMARK Deadlines

Please refer to the following definitions to determine the most appropriate category in which to submit a Full Application.

ARTS EDUCATION ORGANIZATIONS..........February 2, 1998

Organizations dedicated to providing arts education in more than one discipline area outside of school curriculum or a degree program. Activities may serve participants in a narrow or wide age range. Organizations whose primary programming activity is providing art education programs in a single discipline area, such as visual, dance, theater, etc.–must apply in that discipline category.

Organizations considering application to this category should consult program staff to determine eligibility.

ART SERVICE ORGANIZATIONS...............February 2, 1998

Organizations, not restricted to one discipline area, serving the needs of individual artists or nonprofit arts organizations usually through technical assistance or the provision of other services such as mailing labels, newsletters, equipment rental, group insurance, etc.

Note: Organizations providing services to artists or organizations in one discipline area must apply to that discipline area to be considered for funding.

DANCE...February 13, 1998

Organizations whose primary activity is the creation, production and/or presentation of dance. Dance may include traditional, classical, or contemporary forms. This discipline area often includes ethnic, ballet, modern, tap, and jazz among other forms. Organizations whose primary activity is presenting dance or providing services to dance organizations must apply in this artistic discipline.

INTERDISCIPLINARY ARTS

Interdisciplinary arts organizations must apply in the discipline category that most closely resembles their work.

LITERATURE...May 1, 1998

Organizations whose primary purpose is to foster writing activities including fiction, poetry, essays, and nonfiction as a professional artistic pursuit. Literature applications come from a variety of arts organizations including literary presses, journals, magazines, literary centers, workshops, and service organizations for literature.

MEDIA ARTS...April 10, 1998

Organizations involved in the mediums of film, video, radio, television, and media service organizations that are nonprofit in nature.

Note: Media arts organizations may request either general operating support or project support; however, broadcast organizations may request project support only.

MULTI-DISCIPLINARY ARTS...................February 2, 1998

Organizations that provide significant organizational resources for two or more distinct artistic disciplines, e.g., dance and visual arts. Multi-disciplinary applications come from a variety of arts organizations including local arts agencies, arts centers, festival producers, and social service organizations that provide arts programming to their clients. Organizations with a predominant discipline focus, but with ancillary activities in other disciplines should consult program staff before submitting an application.

MUSIC
Performing Groups...................................April 24, 1998

Organizations including symphony orchestras, opera companies, chamber groups, choruses, and traditional music groups whose primary activity is performing rather than presenting music (see the following definition).

MUSIC
**Presenting, Festivals, Service and
Training**...March 20, 1998

Organizations whose primary activity is the presentation of music, music festivals, service to the musical field, and/or music training for youth and adults, particularly pre-professional training.

PRESENTING ORGANIZATIONS...................February 2, 1998

Organizations whose primary programming activity is the presentation, rather than production, of the performing arts of varying disciplines. Organizations who present in a single discipline area such as dance or music should apply to that discipline category.

THEATER...March 2, 1998

Organizations involved in children's theater, puppetry, story-telling, musical theater, light opera, theater-oriented performance art, mime, and theater service organizations; as well as large, medium, and small theaters producing contemporary, classical, and avant garde dramatic works.

VISUAL ARTS...................................February 2, 1998

Organizations whose primary activities include the exhibition and/or creation of visual art or services for the visual arts field. Applicant organizations represent a diverse field including nonprofit, university, and municipal galleries; museums; alternative exhibition spaces; culturally specific organizations; and organizations involved in the creation of public art.

Purpose

The Organizational Support Program (OSP) was created to encourage the artistic and administrative development, stability, and vitality of California arts organizations. By supporting a diversity of arts organizations, the CAC furthers its goals of increasing accessibility to the arts and stimulating economic and community development through the arts. Awards to organizations at various levels of development help them to achieve a wide range of objectives. Applicant organizations may request funds for general operations or for specific projects related to their overall development goals.

Eligibility

Arts organizations applying for funding in the Organizational Support Program must demonstrate consistent arts programming in California for at least two years prior to the time of application.

An organization whose main purpose is not arts production or presentation may apply if it can be demonstrated that arts programming is integral to its activities. An applicant organization must meet the following legal requirements:

1. It must demonstrate proof of nonprofit status under section 501(c)(3) of the Internal Revenue Code, or under section 23701d of the California Revenue and Taxation Code, or it must be a unit of government.

   Note: An organization that lacks nonprofit status—but does meet the two-year eligibility requirement, and requirements 2-6 that follow—may use a fiscal receiver that has nonprofit status, which will provide the fiscal and administrative services needed to complete the grant.

The fiscal receiver must also be able to demonstrate consistent arts programming in California for at least two years prior to the time of application.

Both applicant and fiscal receiver must have similar organizational goals, and must enter into a formal letter of agreement on the management of grant funds and on responsibilities associated with completion of the proposal. A copy of the letter of agreement must be submitted with the proposal as indicated in the checklist found on the inside back cover of the application form. If a grant is awarded, the fiscal receiver becomes the legal contractor.

2. It must have a minimum income of $2,000 in its most recently completed fiscal year.

3. It must comply with the following: the Civil Rights Act of 1964, as amended; section 504 of the Rehabilitation Act of 1973, as amended; the Age Discrimination Act of 1975; the Drug Free Workplace Act of 1988; California Government Code secs. 11135-11139.5 (barring discrimination based on race, color, national origin, sex, age, and disability); the Americans With Disabilities Act of 1990 ("ADA"); and the Fair Employment and Housing Act.

4. It must comply with the Fair Labor Standards Act, as defined by the Secretary of Labor in part 505 of title 29 of the Code of Federal Regulations, and pay professional performers, artists, and other personnel at a compensation level for persons similarly employed elsewhere.

5. Its principal residence must be in California.

6. Previous grantee organizations must have submitted final invoicing for all contracts that have been completed at the time of application.

Application Cycles

The Organizational Support Program operates on a two-year cycle. Applicants that submit a *Full Application* and receive funding do so for a two-year period. Funding contracts are issued separately for each year. Applicants receive a ranking in year one that is carried over into the second year. However, to be considered for funding in year two, eligible applicants must complete the requirements for *second-year reporting*.

Organizations who in 1997-98 are completing the second year of a two-year grant are required to submit a *Full Application* for 1998-99 funding consideration.

Organizations that did not apply to the program in 1997-98 or who applied and were denied funding, are required to submit a *Full Application* for 1998-99 funding consideration.

Organizations denied funding in 1998-99 may reapply the following year with a *Full Application*.

Organizations that submitted a *Full Application* in 1997-98 and received funding will hold their rank for two years (1997-98 and 1998-99) and will be required to submit a *Second-Year Report* for 1998-99 funding consideration.

The following chart details the cycle's structure. It assumes that all applicants, funded or not, will reapply for funding.

	1997-98	**1998-99**	**1999-2000**	**2000-2001**
Applicant A	Full Application submitted and funded	Second-Year Report required for second year funding consideration	Full Application required and funded for next two-year funding cycle	Second-Year Report required for second year funding consideration
Applicant B	Full Application submitted but not funded	Full Application submitted and funded	Second-Year Report required for second year funding consideration	Full Application required for next two-year funding cycle
Applicant C	Second-Year Report submitted (Full Application submitted and funded previous year)	Full Application submitted and funded	Second-Year Report required for second year funding consideration	Full Application required for next two-year funding cycle
Applicant D	Second Year Report submitted (Full Application submitted and funded previous year)	Full Application submitted but not funded	Full Application submitted and funded	Second-Year Report required for second year funding cycle

Large Budget Organizations (LBOs)
Outreach

Large Budget Organizations (LBOs) are defined as organizations with operating budgets of $1 million and above in the last completed fiscal year at the time of application. LBOs collectively represent the major share of operating budgets, audiences, and employment of individuals in the arts in the state. It is the CAC's policy to assist these organizations in playing a major role in serving the broader public. With their collective resources, large budget organizations can be effective in bringing new audiences and the arts together.

The Organizational Support Program supports both general operating and outreach activities of large budget organizations. A minimum of 50% of a LBO s request must be for outreach programs and activities that provide access to the arts for underserved populations.

LBO applicants must demonstrate a clear commitment to outreach and must show evidence of adequate resources and capabilities to carry out the proposed activities.

The CAC's outreach priorities are:
- Access programs for members of the community that ordinarily do not participate in an organization's ongoing programs;
- Activities and programs that share the organization's resources with other, smaller and/or culturally specific arts organizations;
- Exhibition and performance opportunities for new creative talent; and
- Training opportunities for artists, technicians, and arts administrators who are entering the profession.

The CAC recognizes that first-time LBO applicants with little or no experience in outreach programming may need time to plan effective outreach activities. Therefore, first-time LBO applicants may choose to request only general operating support at half of the maximum request amount allowed. In order to request the maximum allowed, LBOs must fully meet the outreach requirements of the program.

All past LBO grantees must propose outreach programs at a minimum of 50% of the requested amount.

Outreach Planning Grants

The CAC recognizes the importance of planning for effective outreach programs and activities. Small matching grants for planning outreach programs will be made available on a onetime basis over the next year to first-time LBO applicants choosing to postpone their outreach request. This option is available only once and only for first-time LBO applicants. Those interested in such funding must identify the request on the application cover page (see page 1, question 19). Due to limited funds available, only a few grants ranging from $500 to $2,500 will be available for 1998-99.

Matching Requirements For All Applicants

All grant recipients must provide a dollar-for-dollar (1:1) cash match. The cash match may be from private contributions, local or federal government, or earned income. State funds (from CAC programs or other state agencies) cannot be used as a match. *In-kind contributions are not allowed as a match.*

Review Criteria For All Applicants

Peer review panels will evaluate and rank all applications based on the following criteria. These criteria will be applied to each applicant on a case-by-case basis and in the context of the community it serves, its mission, and the purpose of CAC funding.

Artistic Quality of Programs and Services
Artistic quality of programs and services is the preeminent criterion on which an applicant will be ranked. Artistic quality is often defined by:
- How well programs and services address the applicant's mission.
- Artistic qualifications of individuals involved in the delivery of programs and services.
- Production or exhibition values including importance to the field, innovation, and exposing audiences to the best of the art form.

Managerial and Fiscal Competence
- Effectiveness of managerial structure and decision-making process.
- Long and short-range planning.
- Qualifications and effectiveness of board and staff as they relate to the practices of the field.
- Strong fiscal controls and budgeting process resulting in accountability for the expenditure of resources.
- Fiscal health as evidenced by surplus/deficit position and a variety of funding sources.

Relationship to the Community
- Efforts to aggressively promote accessibility to programs and services for all sectors of the public.
- Ability to develop programs and services that meet the needs of the community.

Community Representation
- Administrative and artistic personnel that represent the makeup of the community.
- Broad geographic and professional diversity representative of the community.
- The use of advisory boards or other mechanisms to ensure broad community representation in programs, services, and governance.

Community Development Impact
- Contributing to the economic vitality of the community through programs and services that address community needs, such as attracting tourism, building relationships with the business community, and encouraging education and communication.
- Exploring collaborations with other arts organizations and non-arts groups to address the economic, social and educational needs of the community.

Equitable Payment to Artists
- Commitment to adequate compensation for artists given the organization's resources at comparable rates to others employed in the same field.

Request Amounts

Maximum request amounts are based on an organization's total cash *income* in the most recently completed fiscal year at the time of application. The maximum request amount will be computed by the CAC. However, the chart and the request amount worksheet (pages 2 and 3 of the application) will assist an applicant in making an approximate determination of their maximum request amount for the purpose of this application.

Note: Because CAC award amounts are calculated as a percent of the amount requested, applicants should always request the maximum amount allowable.

An organization whose main purpose is not arts production, presentation, or services must base its request only on its arts activities budget.

How Awards Are Determined

Panels of selected arts professionals, who volunteer their time and service, review and rank proposals according to the criteria; however, panels do not recommend dollar amounts. These are determined by a formula.

Applicants at the top rank receive the highest percentage of their request, applicants at the next level receive a lesser percentage, and so on, until available funding is exhausted. All grant panel recommendations are submitted to the CAC for final approval.

What We Do Not Fund

- For-profit organizations;
- Other state agencies;
- Elementary or secondary schools and school districts;
- Organizations or activities that are part of the curricula base of schools, colleges, or universities;
- Out-of-state travel or activities;
- Programs not accessible to the public;
- Purchase of equipment, land, buildings, or construction (capital expenditures);
- Hospitality or food costs;
- Trust, endowment funds;
- Projects with religious or sectarian purposes;
- Expenses incurred before the starting date of the contract;
- State-Local Partnership Agencies, as recognized by the State-Local Partnership Program of the CAC; and
- Indirect costs of schools, community colleges, colleges, or universities.

One Application Rule

Although most organizations are restricted to one application to the Organizational Support Program, certain organizations, such as universities or municipalities, may be eligible to submit two organizational grant proposals. Each proposal must be in distinctly different arts disciplines, and must support separate and distinct operations of the parent organization. Each operation must also be governed by separate advisory bodies.

Incomplete Applications

Incomplete applications will not be considered for funding.

New Applicants: Letter of Intent

If your organization did not apply to the Organizational Support Program in 1997-98, but wishes to apply in 1998-99, you are considered a new applicant. As such, you are strongly urged to submit a letter of intent to establish eligibility. The deadline for filing the Intent to Apply Form is 30 days prior to the Full Application deadline. The form is provided on page ix.

Staff Assistance

The staff is available on a limited basis to offer guidance and clarification in preparing your proposal. OSP staff and discipline specialists are listed at the beginning of this document. Be sure to contact staff far enough ahead of the deadline to ensure that you can be accommodated.

Application Instructions

This Full Application form has been revised; please read the instructions before completing it. Failure to include the information in the required format may result in elimination of your proposal. Applications must be typewritten in easily readable type size, no smaller than 10 pt.; we recommend using 12 pt. CG Times or Times New Roman.

Standard Application Materials

Include the following in your application package:
The core application:
*   Cover Page (page 1)
*   Request Amount Worksheet (page 3)
*   Narrative (pages 4-6)
*   Proposal Summary and Request Budget (page 8)
*   Demographics (pages 9)
*   Board of Directors (page 10)
*   Staff Listing (page 11)
*   Organizational Budget Summary (pages 13,15)

Outreach Materials
(Large Budget Organizations Only)

Large Budget Organizations requesting outreach support at a minimum of 50% of their request must submit the following information:
*   Outreach Supplement (pages 16-17)
*   Outreach Proposal Summary and Outreach Budget (page 19)

Discipline Page(s)

Each artistic discipline is required to submit additional information specific to that particular discipline. Refer to the discipline page(s) for the discipline in which you are applying:
*   Arts Services, page 20-21
*   Dance, pages 22-23
*   Literature, pages 24-25
*   Media Arts, pages 24-25
*   Multi-Disciplinary, pages 29-31
*   Music (includes Opera), pages 32-33
*   Music Performing Groups, pages 34-35
*   Presenters, pages 36-37
*   Theater (includes Musical Theater), pages 38-39
*   Visual Arts (includes Crafts, Design Arts, Museums, and Photography), pages 40-44

Complete Financial Report FY 1996-97. Submit applicant organization's complete financial report, including income, expenses, assets, liabilities, and fund balance for fiscal year 1996-97.

Whenever possible, submit a CPA audit. If an independent audit is unavailable, the financial statement must be certified by your treasurer or budget officer.

Do not submit bound financial statements. Remove all pages from bindings and reduce oversized fold-out pages to 8 1/2" x 11". *Do not send Federal 990-T forms or Franchise Tax Board reports in lieu of a complete financial report.*

Recent Reviews: If appropriate to your organization, send no more than two reviews that have appeared within the past year. Photocopy to fit standard 8 1/2" x 11" format.

Proof of Nonprofit Status: Include a current copy of your proof of nonprofit status under sec. 501(c)(3) of the Internal Revenue Code or under sec. 23701d of the California Revenue and Taxation Code. Articles of Incorporation are not proof of nonprofit status.

Other Required Information

You are also required to attach additional supplementary pages if your organization's request involves a significant arts education or training component;
*   Arts Education, pages 45-46
*   Arts Training Organizations, page 47

Attachment Labeling Requirements

Label each attachment in the upper right corner with the name of your organization. Add these attachments to the application in the order illustrated on the inside back cover of the application. Be selective about choosing materials. Do not send more than is required; any non-required materials will be disposed of and will not be part of the review process.

1998-99 ORGANIZATION INTENT TO APPLY FORM
Deadline: 30 Days Prior to Discipline Deadline for Full Application (See page iii.)

If your organization did not apply to the Organizational Support Program in 1997-98, but wishes to apply in 1998-99, you are considered a "new" applicant. As such, you are strongly urged to submit this form.

Organization: _____

Contact Person: _____

Telephone Number: (_____)_____

Discipline: _____

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1. Budget Size (income for the last completed fiscal year): $_____

2. How long has your organization been actively programming in California: _____ **years**   _____ **months**

3. Has the organization engaged in consistent arts programming in California in the last two years?   **Yes____ No____**
   If the answer is no, please explain below.

4. Date your organization received its nonprofit status under section 501(c)(3) of the Internal Revenue Code and/or under section 23701d of the California Revenue and Taxation Code: _____
   Include a current copy of your proof of nonprofit status as referenced above.

5. If your organization does not have its own IRS 501(c)(3) or California nonprofit status, identify fiscal receiver to be used in this application process. (See eligibility requirements, page iv.) Include a copy of the proposed fiscal receiver's proof of nonprofit status.

6. Last time you applied to the CAC for Organizational Support, if applicable.   _____

7. Briefly describe your organization's programs:

8. Briefly describe your proposed request:

Send samples of your most current season brochures, newsletter, calendar of events, listing of services, etc.

Return this form along with the requested enclosures by the deadline indicated above. Send to the appropriate discipline specialist as listed on page ii, at the following address: Organizational Support Program, California Arts Council, 1300 I Street, Suite 930, Sacramento, CA 95814.

Other Related Opportunities

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Governor's Conferences on the Arts: The CAC sponsors annual Governor's Conferences on the Arts, focusing on a general theme each year. Past themes have included Arts and Education, Cultural Tourism, Arts and Technology, and the Globalization of Culture. Contact Gloria Woodlock.

Arts License Plate Funding: Proceeds from the funding for the Arts License Plate, depicting a scene created by California artist Wayne Thiebaud benefits arts education and local arts programming throughout the state. For further information or to request brochures for distribution at performances, contact April Geary. Call 1-800-201-6201 for your application.

Other California Arts Council Resources

Grants Programs

Artists in Residence Program. Project funding that emphasizes long-term, in-depth interaction between professional artists, and the public through workshops and classes sponsored by schools, nonprofit organizations, units of government, social institutions, and tribal councils. Contact Carol Shiffman or Wayne Cook.

Performing Arts Touring and Presenting Program. Assists artists and presenters in bringing high quality performing arts to communities throughout the state. The program accomplishes this goal by providing organizations artist fee support when they choose to present CAC Roster Artists (those included in the CAC's *1998-99 Touring Artists Directory*). Fee support is the reimbursement of a portion of the fees paid to the artists in return for their services in the host community. Artists/ensembles wishing to apply to be included in the CAC's *Touring Artists Directory* need to have a consistent touring history over the past two seasons. Artists/ensembles do not need to have nonprofit status. Contact Patricia Milich or Rob Lautz.

More detail about these and other CAC programs is available in the CAC's *1997-98 Guide to Programs*.

Organization Name: _____

Organization Application: 1998-99 Full Application

Applicant Description

1. Name of Organization

   _____
   popular name

   _____
   legal name, if different

   Federal Employer ID # _____

2. Address _____

   _____

3. City _____ CA

4. ZIP Code _____

5. County _____

6. Contact Person on Board of Directors

   _____
   first name   last name

7. Administrative Director

   _____
   first name   last name

8. Artistic Director

   _____
   first name   last name

9. Contact Person

   _____
   first name   last name

   _____
   title

10. Telephone (_____)_____

11. Fax (_____)_____

12. E-mail _____

13. Web address: _____

14. Applicant Discipline _____

15. Approximate Grant Amount Requested (see page 3 for Request Amount Worksheet) $_____

16. Number of years the applicant organization has consistently been doing arts programming in CA _____

17. Date the applicant organization received its 501(c)(3) and/or California nonprofit status _____

18. Does this application contain proposed outreach programs? (LBO applicants only)   ❐ yes   ❐ no

19. Does this application include a request for an outreach planning grant? (first-time LBO applicants only)   ❐ yes   ❐ no

    Outreach planning grant request amount: $ _____ (See requirements, page vi.)

20. Are you delinquent on the repayment of any state or federal debt, such as delinquent payroll or other taxes?   ❐ yes   ❐ no

Fiscal Receiver (Refer to eligibility requirements on p. iv, if applicable.)

21. Name of Fiscal Receiver Organization

    _____

    Federal Employer ID # _____

22. Address _____

    _____

23. City _____ CA

24. ZIP Code _____

25. County _____

26. Contact Person

    _____
    first name   last name

27. Telephone (_____)_____

28. Certification

I certify that the applicant organization has proof of nonprofit status under sec. 501(c)(3) of the Internal Revenue Code, or under sec. 23701d of the California Revenue and Taxation Code, or that applicant is a unit of government; that applicant has been consistently engaged in arts programming for a specific number of years prior to time of application; that applicant complies with the Civil Rights Act of 1964, as amended; sec. 504 of the Rehabilitation Act of 1973, as amended; the Age Discrimination Act of 1975; observes provisions of the Drug Free Workplace Act of 1988; and California Government Code secs. 11135-11139.5 (barring discrimination); that applicant complies with the Fair Labor Standards Act, as defined by the Secretary of Labor in part 505 of title 29 of the Code of Federal Regulations; the Americans With Disabilities Act of 1990; and the Fair Employment and Housing Act; that applicant has its principal place of business in California; has completed prior contract evaluations, if applicable; and has approval of applicant's board of directors or other governing body. I hereby certify that to the best of my knowledge and belief, the data in this application and in any attachments hereto are true and correct.

Applicant

_____
signature, authorized board member   date

_____
typed name and title

Fiscal Receiver (if applicable)

_____
signature, authorized board member   date

_____
typed name and title

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Request Chart

1996-97 Total Income	Approximate Request Amount	1996-97 Total Income	Approximate Request Amount
$2,000 - $24,999	$2,000 or 30% of total cash income (whichever is greater)	$1,300,000	$81,894
		$1,400,000	$86,697
		$1,500,000	$91,397
$25,000 - $49,999	30% of total cash income	$1,600,000	$96,000
		$1,700,000	$100,513
$50,000 - $200,000	$18,000	$1,800,000	$104,941
$220,000	$19,498	$2,000,000	$113,561
$240,000	$20,969	$2,200,000	$121,893
$260,000	$22,416	$2,400,000	$129,961
$280,000	$23,841	$2,600,000	$137,789
$300,000	$25,245	$2,800,000	$145,394
$320,000	$26,630	$3,000,000	$152,793
$340,000	$27,997	$3,200,000	$160,000
$360,000	$29,347	$3,840,000	$181,900
$380,000	$30,681	$4,480,000	$202,253
$400,000	$32,000	$5,120,000	$221,283
$420,000	$33,304	$5,760,000	$239,155
$440,000	$34,595	$6,400,000	$256,000
$460,000	$35,873	$7,040,000	$271,920
$480,000	$37,137	$7,680,000	$286,999
$500,000	$38,390	$8,320,000	$301,308
$520,000	$39,632	$8,960,000	$314,906
$540,000	$40,862	$9,600,000	$327,844
$560,000	$42,082	$10,240,000	$340,165
$580,000	$43,291	$10,880,000	$351,910
$600,000	$44,490	$11,520,000	$363,111
$620,000	$45,680	$12,160,000	$373,799
$640,000	$46,860	$12,800,000	$384,000
$660,000	$48,032	$13,440,000	$393,740
$680,000	$49,194	$14,080,000	$403,040
$700,000	$50,349	$14,720,000	$411,920
$720,000	$51,494	$15,360,000	$420,398
$740,000	$52,632	$16,000,000	$428,492
$760,000	$53,762	$16,640,000	$436,216
$780,000	$54,885	$17,280,000	$443,585
$800,000	$56,000	$17,920,000	$450,612
$820,000	$57,108	$18,560,000	$457,309
$840,000	$58,209	$19,200,000	$463,687
$860,000	$59,303	$19,840,000	$469,758
$880,000	$60,390	$20,480,000	$475,531
$900,000	$61,471	$21,120,000	$481,015
$920,000	$62,545	$21,760,000	$486,220
$940,000	$63,613	$22,400,000	$491,153
$960,000	$64,675	$23,040,000	$495,822
$980,000	$65,731	$23,680,000	$500,234
$1,000,000	$66,781	$24,320,000	$504,397
$1,100,000	$71,946	$24,960,000	$508,317
$1,200,000	$76,980	$25,600,000 +	$512,000

STOP!

Read this page very carefully and respond as directed.

Request Amount Worksheet

The applicant's total cash operating income in its last completed fiscal year will establish the maximum amount of the request.

An organization whose purpose is not solely arts production, presentation, or service must base its request only on its arts activities budget. The Organizational Budget Summary, pages 13 and 15, must be completed to reflect the applicant's arts activities budget only. Universities and other multifaceted organizations must include only that portion of the budget pertinent to this proposal.

Begin by filling out the FY 1996-97 cash income column on the Organizational Budget Summary (pages 13 and 15). Use the following worksheet to compute your maximum request:

A. List the 1996-97 cash income $_____

Note: This figure must not include any in-kind support.

If any of the following sources are included in line A, list them here:

    1.   Loans/lines of credit $_____

    2.   Funds raised
        for endowment $_____

    3.   Funds raised for
        nonoperating capital $_____

B. Total, lines 1, 2, and 3 $_____

C. Line A minus Line B $_____

- Line C represents your total adjusted cash income. Use the table on the facing page to determine your approximate request amount.

- Line C should be the same total as shown on page 13, column 2, line 17.

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Proposal Narrative

Briefly and concisely answer the following questions in the space provided. *Do not reduce type or attach additional pages.*

1. **Artistic Mission:** What is your organization's mission?

2. **History of Organization:**

    a.   List and briefly describe the history of your organization and its *major* accomplishments.

    b.   Explain any *major* changes that have taken place in the past year.

3.   **Planning and Implementation—do not exceed one (1) page single sided in responding to a) and b).**

a)   Briefly describe your planning process. For instance, does your board have a standing planning committee? Has your organization developed a long range plan? *If so, please include one (1) copy along with your application.* Is the plan annually updated and evaluated against your resources and budget?

b)   Briefly list in an order of priority the following: 1) **Long-term goals**; and 2) **Short-term goals**:

4. **Community Development:** Building relationships with businesses, schools, community groups, arts organizations, individuals, etc. to the benefit of the participants and the economic, artistic, and/or social needs of the community.

    a) **Collaborations:** The sharing of resources, knowledge, and skills on common projects of mutual interest.

    List significant collaborations clearly explaining:
- Nature of the project.
- Degree of involvement by all parties and the role of each participant.
- Length of the collaboration.
- Results of collaborations as they pertain to participants and the community, quantifying wherever possible.

    b) **Partnerships:** The providing or exchanging of programs and/or services.

    List significant sponsorships clearly explaining:
- Nature of the program or service.
- Degree of involvement by all parties and the role of each partner.
- Length of the partnership.
- Results of partnerships as they pertain to partners and the community, quantifying wherever possible.

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Instructions, page 8

Page 8 is a summary of your CAC Request.

PROPOSAL SUMMARY
In completing the Proposal Summary (page 8), be very specific about how CAC funds will be spent in the grant period, October 1, 1998—September 30, 1999. Do not use general statements such as "operating support" or "administrative and artistic fees." Instead, provide detail of expenditures such as operating expenses to support rent, utilities, publication of newsletter, or specific project-related expenditures such as installation costs, production costs, etc.

For administrative and artistic expenditures, indicate program or project area and the specific responsibilities of the individual to be paid. If known at the time the application is submitted, include the names of administrative and/or artistic personnel, consultants, and artists that may be hired for a project. All types of expenditures must be detailed in the proposal summary.

A lack of specificity in preparing your proposal summary may reflect negatively on your application.

REQUEST BUDGET
Breakdown the dollar amount of your request in the categories listed on the form. Before completing the request budget, carefully read the following explanations of the budget components.

Personnel
Identify personnel for which you are requesting funds by using the categories provided. Indicate new positions by checking the box next to the job title listing. "Rate of Pay" should include compensation and fringe benefits and must be indicated for all personnel requests. The rate of pay must reflect a dollar figure (payment per hour, day, week, month, year). *Do not use statements such as "by contract" or "varies."*

Note: If a position overlaps categories (e.g. an artistic director who is also a business manager), indicate the total salary as one line, but show approximate percentage of time spent on each activity.

- *Artistic Personnel:* artistic directors, conductors, curators, composers, choreographers, designers, video artists, filmmakers, painters, poets, authors, sculptors, actors, dancers, designers, musicians, teachers, traditional folk artists, puppeteers, etc.
- *Technical and Production Personnel:* technical directors, wardrobe, lighting and sound crew, stage managers, stagehands, video and film technicians.
- *Administrative Personnel:* program and managing directors, business managers, press agents, fund-raisers, clerical, maintenance and security staff, ushers, box office personnel, etc.
- *Outside Fees and Services (consultants):* This may include positions in above categories that are not considered employees by the applicant, but are hired specifically for the proposed activities.

Note: All job titles should provide gross, not net, pay rate and total hours/months budgeted. Where several persons hold the same job title and pay rate, indicate how many.

Operating Expenses
- *Space Rental:* include office, theater, studio, storage, and other space rentals.
- *Equipment Rental:* CAC funds can be used for equipment rental but not for equipment purchase.
- *Travel:* CAC funds may be used for in-state travel only.
- *Supplies:* include only expendable materials; capital purchases or food costs are not allowed.
- *Other:* include expenses other than those indicated above.

Applicant Cash Match
- For *"Personnel"*: Match each salary line on a minimum dollar-for-dollar basis; this means no more than 50% of any specific salary will be funded by the CAC. This applies to all positions, whether permanent in-house or consultant salaries, full-time or part-time, or for contracted services. Personnel expenses cannot be matched by operating expenses.
- *"Operating Expenses"*: Need not be matched line-by-line; however, operating expenses requested may be offset only by other operating expenses.
- In all cases, the "Grand Total Applicant Cash Match" should equal the "Grand Total CAC Request."

Note: The Request Budget must be completed by all applicants submitting a full application, including LBO applicants. The Request Budget must equal the applicant's total request. LBO applicants are also required to submit an Outreach Budget which represents at least 50% of their total request. First-time LBO applicants who elect to apply for only general operating support and who have requested an outreach planning grant are exempt from submitting an Outreach Budget and Outreach Supplement.

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Proposal Summary

What is your organization requesting CAC funds to support? The explanation should be concise and specific.

Request Budget

The request budget must be filled out to correspond with the above request.

Note: The *Rate of Pay* is required and must reflect a specific dollar figure, i.e. payment per hour, week, month, or year.

		New	Job Title	Rate of Pay	CAC Request	Applicant Cash Match (do not over match)
A.	**Personnel** (include fringe benefits)					
	Artistic	☐	_____	_____	_____	_____
		☐	_____	_____	_____	_____
		☐	_____	_____	_____	_____
	Administrative	☐	_____	_____	_____	_____
		☐	_____	_____	_____	_____
	Technical & Production	☐	_____	_____	_____	_____
		☐	_____	_____	_____	_____
		☐	_____	_____	_____	_____
	Outside Fees/Services, Artistic	☐	_____	_____	_____	_____
	Outside Fees/Services, Other	☐	_____	_____	_____	_____
				Total Personnel	_____	_____

		Where Applicable, List Rate of Expense	CAC Request	Applicant Cash Match (do not over match)
B.	**Operating Expenses**			
	Space Rental	_____	_____	_____
	Equipment Rental	_____	_____	_____
	Travel (in-state)	_____	_____	_____
	Supplies	_____	_____	_____
	Other Operating Expenses (specify)	_____	_____	_____
	Total Expenses		_____	_____
	Grand Total		_____	_____

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Demographics

This information is requested to assist the grant review panel in understanding the community in which an applicant is located, how this community is served through programs and services, and how the community is reflected in the applicant's audiences and personnel (board, staff, and volunteers).

Audience:

1. Describe the community in which your organization is located, and how it relates to your targeted audience.

2. Describe how your organization provides and promotes accessibility for and by all sectors of the public.

3. Approximately how many individuals, excluding employees and/or paid performers, benefitted from your organization's arts activities during the last completed fiscal year? (Indicate the year: _____).

    A. Ticketed audience   _____
    B. Non-ticketed audience (complimentary/free)   _____
    C. Outreach, e.g., school, institution and community audiences:
                                   Ticketed: _____
                                   Free: _____
      This count should not be reflected in A or B, above.
    D. Total Audience (sum of A through C, above)   _____

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Board of Directors

Provide the following information and indicate officers.

Duplicate and complete this page for all advisory boards and/or committees; title page(s) accordingly. Include a description of the function of advisory group and its meeting schedule at the bottom of the page.

Name	Occupation	City of Residence	Member Since (year)

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Staff: Artistic and Administrative

Provide the names, titles, qualifications, and tenure of core staff members who are responsible for artistic and administrative decisions.

Optional: You may attach an expanded one-page bio for each core staff member, if needed.

Artistic:

Name   **Title and Brief Description of Qualifications**

Administrative:

Name   **Title and Brief Description of Qualifications**

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Organizational Budget Summary Instructions, page 13

An organization whose purpose is not solely arts production, presentation, or service must base its request only on its arts activities budget. The Organizational Budget Summary must be completed to reflect the applicant's arts activities budget only.

REMINDERS ON COMPLETING BUDGET SUMMARY

Do:
- Use "other" lines and attach schedules as needed;
- Use notes to explain and clarify the budget line items where changes are significant from year to year (10% or more);
- Fill in all columns; and
- **Check arithmetic**.

Do Not:
- Change, alter, or combine lines;
- Include in-kind support, except on line XII;
- Include portions of your budget not relevant to arts programming;
- Include endowment, capital funds and/or loans, except as indicated on page 15.
- Include pass-through support, except on line XIII.

For each fiscal year, complete appropriate budget categories. Complete, as is the case, the surplus income or deficit and the accumulated surplus or deficit in the lines provided. Describe on page 15 under Budget Notes the plans to reduce the deficit or use the surplus.

Observe the following general rules:
- Follow lines exactly as printed; do not cross out, alter, or combine lines. Use lines marked "Other" in each category to accommodate special reporting needs (attach schedules where appropriate).
- Limit this budget to activities directly pertinent to arts programming. Do not include indirect costs.
- Be certain that in-kind support is reflected only on line XII. Remember, this is a cash budget. Call CAC staff person if you have questions regarding "in-kind."
- The budget page is to cover four full years. If your fiscal year corresponds to the calendar year, include budgets for 1996, 1997, 1998 and 1999. *If you changed your fiscal year during this period, adjust figures to the best of your ability so each column reflects exactly 12 months. Provide a budget note on page 15 to clarify.*
- Complete the Budget Notes and Schedules section, page 15, where necessary to explain circumstances that might appear problematic, for example: to clarify unusually large increases or decreases; to explain why certain figures appear large or small for an organization of your kind; to explain plans to retire a deficit or use a surplus; to explain why figures on Budget Summary page may differ from those in in-house budgets and financial statement. A portion of the page has been set aside for budget notes.
- You are required to attach schedules for lines marked "Other." The Budget Notes section of page 15 can be used if space permits.

DEFINITIONS
I. A. Contributed Income
- Federal Government: Cash support from grants or appropriations by federal agencies, including the National Endowment for the Arts (NEA). Use a note to indicate which NEA program is the source of a grant.
- State Government: Cash support (other than this request) from the CAC or other state agencies.
- Grant Amount Requested: For projected year only, write total grant request as it appears on page 1, line 15. (See request amount worksheet, page 3.)
- Local/Municipal Government: Cash support from grants or appropriations by city, county, in-state regional, and other government agencies.
- Individual Contributions: Cash support from private individuals; e.g., donations from patrons, boards of directors, etc.
- Business/Corporate Contributions: Cash support.
- Foundations: Cash support from private or community foundations. (Note: List corporate foundation support on line 6.)
- Memberships: Cash support (usually dues) from constituents or patrons who receive membership privileges.
- Fund-raising: Include *gross* proceeds from benefits, or other special events. Include contributions from guilds and auxiliaries. Do not include income from bookstores, restaurant, or other non-program-related activities. These should be listed on Earned Income lines.

I. B. Earned Income
- Admissions: Revenue from admissions, tickets, subscriptions, etc.
- Touring: Revenue from touring activities.
- Contracted Services: Contract revenue from specific services (usually with an organization or unit of government), including performance or residency fees, etc.
- Tuition/Workshops: Revenue from sale of services (usually to individuals), such as classes, workshops, training.
- Product Sales: Earned revenue from other sources, such as catalog sales, advertising space in programs, parking, etc.
- Investment Income: Dividends, interest, capital gains and their proceeds, including earnings from endowments if used for operations.
- Other: Other sources, if any, such as *net* income from bookstores, restaurant, or other non-program related activities, if such income is used to support operations.

II. A. Personnel Expenses: Include salaries, wages and benefits for employees, payment to consultants.
- Artistic/Administrative/Technical: For Full-Time, include all year-round and permanent staff; for Other, include all part-time, project based, seasonal, collaborating, and consulting personnel.

II. B. Operating Expenses
- Facility Expenses/Space Rental: Rental of office, rehearsal facilities, theater, hall, gallery, etc., and overhead for basic utilities. Also include non-structural renovations and improvements. *Do not include capital expenditures.*
- Marketing: Marketing, publicity, and promotion, not including payments to personnel listed above (II. A.). Include: costs of newspaper, radio, and television advertising; printing and mailing of brochures, flyers, or posters; food, drink, and space rental when directly connected to promotion, publicity, or advertising.
- Production/Exhibition: Costs of artistic production, including: electricity, storage, photo supplies, publication purchases, sets and props, equipment rental, insurance fees, trucking, shipping, and hauling expenses not entered under Travel.
- Travel: All travel connected with personnel, including fares, hotels, and other lodging expenses, food, taxis, gratuities, per diem payments, toll charges, mileage, allowances.
- Fund-raising Expense: Total cost of fund-raising activities. Fund-raising expenses should relate to fund-raising events included in contributed income.
- Other Operating Expenses: Be sure to attach a schedule if amount of this line exceeds 10% of total expenses. Include loan payments, interest charges, miscellaneous administrative expenses not covered above; yearly acquisitions budget; insurance; structural improvements.

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Organizational Budget Summary and Budget Notes and Schedules

Fiscal Year begins (month) _____ This budget page is to cover four full years, 12 months per year. If your fiscal year corresponds to the calendar year, include budgets for 1996, 1997, 1998 and 1999.

Operating Budget Only

	95-96 (actual)	96-97 (actual)	97-98 (current)	98-99 (projected)
I. INCOME				
A. Contributed				
1. Federal Government	_____	_____	_____	_____
2. State Government (do not include this request)	_____	_____	_____	_____
3. Grant Amount Requested	///////////	///////////	///////////	_____
4. Local/Municipal Government	_____	_____	_____	_____
5. Individual Contributions	_____	_____	_____	_____
6. Business/Corporate Contributions	_____	_____	_____	_____
7. Foundations	_____	_____	_____	_____
8. Memberships	_____	_____	_____	_____
9. Fund-raising Events **(gross)**	_____	_____	_____	_____
10. Other: _____	_____	_____	_____	_____
Subtotal Contributed	_____	_____	_____	_____
B. Earned				
11. Admissions	_____	_____	_____	_____
12. Touring	_____	_____	_____	_____
12a. Contracted Services	_____	_____	_____	_____
13. Tuition/Workshops	_____	_____	_____	_____
14. Product Sales/Concessions	_____	_____	_____	_____
15. Investment Income	_____	_____	_____	_____
16. Other: _____	_____	_____	_____	_____
Subtotal Earned	_____	_____	_____	_____
17. **Grand Total Income (A+B)**	_____	_____	_____	_____
II. EXPENSES				
A. Personnel*				
18. Artistic Full-time	_____	_____	_____	_____
Other Artistic	_____	_____	_____	_____
19. Administrative Full-time	_____	_____	_____	_____
Other Administrative	_____	_____	_____	_____
20. Technical Production Full-time	_____	_____	_____	_____
Other Technical Production	_____	_____	_____	_____
Subtotal Personnel	_____	_____	_____	_____
B. Operating Expenses				
21. Facility Expenses/Space Rental	_____	_____	_____	_____
22. Marketing	_____	_____	_____	_____
23. Production/Exhibition	_____	_____	_____	_____
24. Travel	_____	_____	_____	_____
25. Fund-raising Expenses **(gross)**	_____	_____	_____	_____
26. Other (if greater than 10% of budget, you must attach a separate schedule)	_____	_____	_____	_____
Subtotal Operating	_____	_____	_____	_____
27. **Total Expenses (A+B)**	_____	_____	_____	_____
III. Surplus (Deficit) at year end (item 17 minus item 27)	_____	_____	_____	_____

* Read corresponding instructions on page 12. Provide footnotes on page 15 to break down personnel expenditures.

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Organizational Budget Summary Instructions, page 15

III. **Operating Surplus (Deficit)**: Enclose deficit figures within parentheses.

IV. **Carryover Fund Balance at Beginning of Year**. Include only operating funds. Do not include value of endowments, cash reserves, restricted funds, or capital assets. For 96-97 actual, current and projected years, this figure should correspond to line VII of the previous column.

V. **Accumulated Surplus**: Add item III, plus item IV, if appropriate.

VI. **Other Net Adjustments**: Include fund transfers, special gifts, etc. Indicate deficit adjustments within parentheses.

VII. **Balance at Year End**: Carry this figure forward to line IV of the next year.

VIII. **Balance of Endowment Fund:** Indicate the balance of the organization's endowment fund. Provide notes detailing major increases and/or decreases to fund.

IX. **Cash Reserves:** Indicate the balance, with notes detailing major increases and/or decreases.

X. **Balance of Non-Operating Capital Funds:** Such as construction or building funds. Provide notes detailing major increases and/or decreases to fund.

XI. **Loans/Lines of Credit:** Indicate the balance of all outstanding loans. Provide notes detailing the reason for the loan, the organization's repayment plan, and term of the loan.

XII. **In-kind Contributions**: Includes the value of in-kind contributions including services, capital acquisitions, space rental, and volunteer services, (artistic, administrative, and technical). If the total exceeds 10% of total income (line 17), attach a schedule.

XIII. **Pass-Through Funds**: Include any funds received as a fiscal agent for the benefit of another organization(s).

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Organizational Budget Summary (Continued)

	95-96 (actual)	96-97 (actual)	97-98 (current)	98-99 (projected)
III. Operating surplus (deficit) from previous page	_____	_____	_____	_____
IV. Carryover fund balance at beginning of year; surplus or (deficit)	_____	_____	_____	_____
V. Accumulated surplus (deficit) (item III plus item IV; if appropriate, describe below under Budget Notes the plan to reduce deficit or utilize surplus)	_____	_____	_____	_____
VI. Other net adjustments to operating budget (explain below)	_____	_____	_____	_____
VII. Balance at year end (item V plus Item VI)	_____	_____	_____	_____
VIII. Balance of endowment fund (if applicable)	_____	_____	_____	_____
IX. Cash Reserve	_____	_____	_____	_____
X. Balance of nonoperating capital fund(s) (if applicable)	_____	_____	_____	_____
XI. Loan(s), outstanding (specify nature of loans in budget notes below)	_____	_____	_____	_____
XII. In-kind contributions (attach schedule if greater than 10% of total income)	_____	_____	_____	_____
XIII. Pass-through funds (i.e., as fiscal agent, etc.)	_____	_____	_____	_____

BUDGET NOTES AND SCHEDULES

You are **required** to provide budget notes to explain significant changes (10% or more) in income and expense line items from year to year. If necessary, attach detailed schedules based on the organization's financial statements. (**Note: Unexplained changes in income or expenses and surplus/deficit positions from year to year may reflect negatively on your application.**)

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Outreach Supplement: Large Budget Organizations Only

The following information is required of all Large Budget Organization applicants (budgets of $1 million and above). At least 50% of CAC funds must be used for outreach activities by these organizations. *(Note: First-time LBO applicants who elect to apply for only general operating support and who have requested an outreach planning grant, see page vi, are exempt from submitting an Outreach Supplement and Outreach Budget.)*

1. List the outreach programs currently operated by your organization.

2. What was the involvement of the targeted outreach communities in planning and design of outreach programs?

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Outreach Supplement: Large Budget Organizations Only (Continued)

3. What percentage of your organization's total cash operating budget is used for outreach? _____ %

4. How does your organization determine the effectiveness and impact of outreach activities?

5. How have you identified potential board members and what criteria was used in the selection process?

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Instructions for Outreach Proposal Summary, page 19

CAC Support for Outreach Programming
In completing the Outreach Proposal Summary of your request, be very specific about how CAC funds will be spent for outreach programming in the contract period.

Do not use general statements such as "operating support" or "administrative and artistic fees." Instead, provide detail of expenditures such as operating expenses to support rent, utilities, publication of newsletter, or specific project related expenditures such as installation costs, production costs, etc.

For administrative and artistic expenditures, indicate program or project area and the specific responsibilities of the individual to be paid. If known at the time the application is submitted, include the names of administrative and/or artistic personnel, consultants and artists that may be hired for a project. All types of expenditures must be detailed in the proposal summary.

A lack of specificity in preparing the Outreach Proposal Summary may reflect negatively on your application.

Outreach Personnel
Identify outreach personnel for whom you are requesting funds by using the categories provided. Indicate new positions by checking the box next to the job title listing. "Rate of Pay" should include compensation and fringe benefits and should be indicated for all personnel requests. The rate of pay must reflect a dollar figure (payment per hour, day, week, month or year). Do not use statements such as "by contract" or "varies."

Note: If a position overlaps categories, indicate the total salary as one line, but show approximate percentage of time spent on each activity.

- *Artistic Personnel:* artistic directors, conductors, curators, composers, choreographers, designers, video artists, filmmakers, painters, poets, authors, sculptors, actors, dancers, designers, musicians, teachers, traditional folk artists, puppeteers, etc.
- *Technical and Production Personnel:* technical directors, wardrobe, lighting and sound crew, stage managers, stagehands, video and film technicians.
- *Administrative Personnel:* program and managing directors, business managers, press agents, fund-raisers, clerical, maintenance and security staff, ushers, box office personnel, etc.
- *Outside Fees and Services (consultants):* This may include positions in above categories that are not considered employees by the applicant, but are hired specifically for the proposed outreach activities.

Note: All job titles should provide gross, not net, pay rate and total hours/ months budgeted; where several persons hold the same job title and pay rate, indicate how many.

Operating Expenses
- *Space Rental:* include office, theater, studio, storage, and other space rentals.
- *Equipment Rental:* CAC funds can be used for equipment rental but not for equipment purchase.
- *Travel:* CAC funds may be used for in-state travel only.
- *Supplies:* include only expendable materials; capital purchases or food costs are not allowed.
- *Other:* include expenses other than those indicated above.

Applicant Cash Match
- *For "Personnel":* Match each salary line on a dollar-for-dollar basis; this means no more than 50% of any specific salary will be funded by the CAC. This applies to all positions, whether permanent in-house or consultant salaries, full-time or part-time, or for contracted services. Personnel expenses cannot be matched by operating expenses.
- *"Operating Expenses":* need not be matched line-by-line; however, operating expenses requested may only be offset by other operating expenses.
- In all cases, the "Grand Total Applicant Cash Match" should equal the "Grand Total CAC Request."

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Outreach Proposal Summary

How will CAC funds be used to support outreach programs in 1998-99?

OUTREACH BUDGET

Note: The *Rate of Pay* is required and must reflect a specific dollar figure, i.e. payment per hour, day, week, month, or year.

Total Outreach Request: $_____

	New	Job Title	Rate of Pay	CAC Request	Applicant Cash Match (do not over match)
A. Outreach Personnel (include fringe benefits)					
Artistic	☐	_____	_____	_____	_____
	☐	_____	_____	_____	_____
	☐	_____	_____	_____	_____
Administrative	☐	_____	_____	_____	_____
	☐	_____	_____	_____	_____
Technical & Production	☐	_____	_____	_____	_____
	☐	_____	_____	_____	_____
	☐	_____	_____	_____	_____
Outside Fees/Services, Artistic:	☐	_____	_____	_____	_____
Outside Fees/Services, Other:	☐	_____	_____	_____	_____
Total Personnel				_____	_____

	Where Applicable, List Rate of Expense	CAC Request	Applicant Cash Match (do not over match)
B. Operating Expenses			
Space Rental	_____	_____	_____
Equipment Rental	_____	_____	_____
Travel (in-state)	_____	_____	_____
Supplies	_____	_____	_____
Other Expenses (specify)	_____	_____	_____
Total Expenses		_____	_____
Grand Total		_____	_____

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Discipline Page: Arts Service Organizations

All Arts Service Organizations should complete the requirements as stated on this and the following page. If your organization serves more than one discipline—is *not* single discipline specific—you should submit your application to the ASO/P category by the postmarked deadline of February 2, 1998. However, if your organization is single discipline specific, you should answer the following questions and submit your application to the appropriate artistic discipline by the deadline indicated on page iii.

1. **Payment to Artists**— "Equitable Payment to Artists" is an established criterion; this information is very important.

    a) Explain your organization's current policy regarding payment to artists. If there are plans for changes in this policy, please explain. If you have established a range of payments to artists, please explain the basis of the range. Please adhere to the space provided.

    b) Complete the following table as it pertains to your particular organization regarding payments to artists and *artistic* salaries by providing figures based on your last completed fiscal year.

Report Artistic Only				
Category	**Number of Individuals**	**Annual Salary**	**Hourly Wage**	**Honoraria/Fee**
Paid Staff–*Full-time*				
Paid Staff–*Part-time*				
Contracted				
Speakers/ Presenters' Fees				
Workshop Leaders				
Other				

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Discipline Page: Arts Service Organizations (Continued)

Be clear and concise and do not exceed three (3) pages single sided in answering questions 2 and 3, below.

2. **Programs and Services:** Provide a schedule of programs and services (*current and planned*) for 1997-98 and 1998-99. You should provide dates, targeted audience, fee structure, and audience figures where applicable.

3. **College or University Affiliation:** If your organization is affiliated with a college or university, summarize your relationship in the areas of governance, finance, staffing, student and community participation, and public accessibility.

4. **Supplementary Materials:** Collate into three (3) identical sets no more than three separate examples of your current (within the past two years) promotional materials, such as brochures, programs of public events, etc., and include as part of your application package.

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Discipline Page: Dance Organizations

Organizations whose primary activity is the creation and/or the production of dance must submit this page. If a significant portion of your activities involve training, submit the training supplement as well.

Dance Presenters: Do not submit this page; instead, submit the Presenters Discipline Page (pages 36--37) and attachments by the Dance discipline deadline.

Dance Service Organizations: Do not submit this page; instead, submit the Arts Service Organization Discipline Page (pages 20-21) and attachments by the Dance discipline deadline.

Dance Training Companies: Submit this page in addition to the Arts Training Organization Supplement (page 47) and attachments. Note that your video will need to include excerpts of actual instruction.

To this page, please attach the following materials:

1. Payment to Artists. (Limit your response to a half page.)

    a. Explain your organization's current policy regarding payment to artists. If there are plans for changes to this policy, please include in your explanation. If you have established a range of payment to artists, please explain the basis of the range.

    b. List fees or salary you are paying to the artistic director, company members, guests, and collaborators. Indicate the time basis by which these artists are paid, length of contracts, and differences between rehearsal and performance rates where applicable.

2. If your organization is affiliated with a college or university, summarize your relationship in the areas of governance, finance, staffing, student, and community participation, and public accessibility. (Limit your response to a half page.)

3. Briefly describe the performance space(s) used by your organization (excluding touring). Include name, location, type of facility, seating capacity, and stage description. (Limit your response to a half page.)

4. An Artistic Vision Statement from your artistic director. (Limit your response to a half page.)

5. Listings of your organization's programs and activities for 1997-98 and 1998-99 using the following headings:

    For performances, create the following headings, including type of presentation: presented, self-produced, co-produced, or a showcase:

Venue	City	Performance Dates	Number of Performances	Type

    For other activities, create the following headings:

Location	Date	Activity

Include with the Application Package

A. Three different samples of your current promotional materials such as brochures, programs, and posters collated into three identical sets.

B. One copy of a videotape of live performance(s) that took place within the last two years. The video should represent the range and artistic quality of your company's current repertoire. Running time is to not exceed five minutes. You may send an edited tape five minutes long or cue a longer tape to the material you wish the panel to view for five uninterrupted minutes. The sample(s) submitted should consist primarily of the work of company members, not guest artists. Special effects, dissolves, superimpositions, etc. are highly discouraged. Dance Training Companies must include excerpts of actual instruction. Use the form on the reverse of this page to provide a log of the taped contents.

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Discipline Page: Dance Organizations (Continued)

Log of Dance Organization Videotape. List works in order as they appear on the video.

If cued to a specific work or excerpt, indicate in the log the particular piece with an asterisk.

	Title of Work	Choreographer	Date Created	Date Taped	Music/sound score Title/composer	Number of Performers	Length of Excerpts
1							
2							
3							
4							
5							

For small group pieces or solos, note names of performers.

Be sure to include return package with adequate postage if you wish work samples to be returned.

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Discipline Page: Literature Organizations

College or University Affiliation: If your organization is affiliated with a college or university, summarize on a separate page your relationship in the areas of governance, finance, staffing, student and community participation, and public accessibility. (Limit your response to a half page.)

1. **Payment to Artists**

   In the space below, describe your organization's policy regarding royalties and payment to writers. Distinguish between paid staff and writers with whom you contract formally and informally. Be as specific as possible in the space provided.

2. **Literary Centers, Workshops, and Service Organizations:**

   - Collated into three (3) identical sets, send at least three separate samples of supporting materials, i.e., press clippings, brochures, evaluation forms, workshop schedules, etc.
   - To this page, attach separate listings of your major programs, services and/or activities for 1996-97 and 1997-98 (maximum two pages) using the following headings:
     Dates of Events: Event Coordinators: Artists Involved: Attendance Figures:Admission Price:
                                               (if available)

3. **Literary Presses:**

   - Complete the information on the following page headed "Presses, Magazines, Journals, and Newspapers."
   - Include six (6) copies of at least two of the press's most recent publications.
   - Collated into three (3) identical sets, send at least three separate examples of current promotional materials, including catalogs and press packets.
   - To this page, attach separate listings of your 1996-97 and 1997-98 events, readings, and other activities.

4. **Literary Magazines, Journals, and Newspapers:**

   - Complete the information on the following page following headed "Presses, Magazines, Journals, and Newspapers."
   - Include six (6) copies of at least two of your more recent publications
   - Collate into three (3) identical sets at least three separate samples of your current promotional and subscription materials.
   - To this page, attach separate listings of your 1996-97 and 1997-98 events and activities.

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Discipline Page: Literature Organizations (Continued)

Presses, Magazines, Journals, and Newspapers: Provide the following information for each book, magazine, journal, or newsletter scheduled to be published in the fiscal year for which CAC funds are requested. Copy and attach additional pages if necessary.

Presses: Author, Title (list all editors, translators, and illustrators where applicable) **Magazines/Journals/Newspapers:** Issue Numbers, Titles, Editors	Size & Format	Estimated Number of Pages	Estimated Print Run	Retail Price/ Estimated Date of Release

All Presses, Magazines, Journals, and Newspapers must address the following:
Describe your distribution and promotion plans regarding these publications. Be as specific as possible. Attach an additional page if necessary.

Be sure to include return package with adequate postage if you wish work samples and promotional materials returned.

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Discipline Page: Media Arts

1. **Payment to Artists— "Equitable Payment to Artists" is an established criterion; this information is very important.**

   a) Explain your organization's ***current*** policy regarding payment to artists. If there are plans for changes in this policy, please explain. If you have established a range of payments to artists, please explain the basis of the range. If applicable, explain your policy regarding ownership rights for work produced at your facility. Please adhere to the space provided.

   b) Complete the following table as it pertains to your particular organization regarding payments to artists and ***artistic*** salaries by providing figures based on your last completed fiscal year.

Report Artistic Only				
Category	**Number of Individuals**	**Annual Salary**	**Hourly Wage**	**Honoraria/Fee**
Paid Staff–*Full-time*				
Paid Staff–*Part-time*				
Contracted				
Speakers/ Presenters' Fees				
Workshop Leaders				
Other				

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Discipline Page: Media Arts (Continued)

Be clear and concise and do not exceed three (3) pages single sided in responding to the questions that pertain to your organization.

2. **Public Access:** If applicable, what days and hours is the organization open to the public? What is the admissions or access policy?

3. **Programs, Services, Workshops, and Seminars:** Provide a schedule of programs, services, and events (*current and planned*) for 1997-98 and 1998-99. You should provide dates, targeted audience, fee or admission structure, and audience figures where applicable.

4. **Production Facility:** Briefly describe your facility. If available, provide a diagram of the space. Provide a schedule of services, programs, and events (*current and planned*) for 1997-98 and 1998-99. You should provide dates, targeted audiences, fee or admission structure, and usage figures.

5. **Exhibition:** Provide a detailed list of your exhibition program (*current and planned*) for 1997-98 and 1998-99, including works to be exhibited and artists scheduled for personal appearances. Also include three (3) copies of samples of program notes, calendars, and exhibition schedules. Briefly describe your exhibition space. If available, provide a diagram of the space.

6. **Broadcast Organizations (nonprofit radio and televisions stations):** *Note: Broadcast media arts organizations are precluded from requesting general operating support and may request project support only.*

   a) Do not exceed three (3) single-sided pages in responding to the following:

      1) What percentage of arts programming comprises your total programming? Briefly explain how you determined this figure.
      2) Provide a brief description of your arts programming; distinguish between regular versus onetime programming.
      3) Discuss the involvement of artists (independent producers) on your staff, board, and advisory committees.
      4) Briefly describe distribution plans for the finished work.

   b) Attach or include with your application, if applicable:

      1) Complete project budget that includes pre-production, production, and post-production expenses.

      2) One (1) copy of a **video or audio sample** of a completed work that was created by the person(s) with primary artistic responsibility for the proposed project must be submitted with your application. If you are requesting money to complete a project, samples must be representative of current work and, wherever possible, convey a clear sense of the artist's conceptual approach to the proposed project. *Be sure to have your work samples properly cued and labeled (log follows) as the panelists' viewing or listening time is limited to five minutes per applicant.*
      3) Provide a **one-page list of previous productions**, which demonstrate your ability to carry out the proposed project.

7. **Training Programs:** Organizations that operate a training program need to complete the Arts Training Supplement Page (page 47).

8. **College or University Affiliation:** If your organization is affiliated with a college or university, summarize your relationship in the areas of governance, finance, staffing, student and community participation, and public accessibility.

9. **Supplementary Materials:** Collate into three (3) identical sets no more than three separate examples of your *current* (within the past two years) promotional materials, such as brochures, programs of public events, etc., and include as part of your application package.

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Discipline Page: Media Arts (Continued)

Video Tape Sample Log.

If applicable, fill out log and attach to your application. Total viewing time cannot exceed five minutes; cue tape(s) if necessary. Label tape and case with the following information:

Title and Brief Description of Work	Producer/ Director	Date and Location of Production	Featured Artist(s)	Length of Tape (indicate VHS or 3/4")
Tape #1				
Tape #2				

Audio Tape Sample Log.

If applicable, fill out log and attach to your application. Total listening time cannot exceed five minutes; cue tape(s) if necessary. Label tape and case with the following information:

Title and Brief Description of Work	Producer	Date and Location of Production	Featured Artist(s)	Length of Tape
Tape #1				
Tape #2				

Be sure to include return package with adequate postage if you wish work samples to be returned.

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Discipline Page: Multi-Disciplinary Arts

All Multi-Disciplinary Arts Organizations should complete the requirements on this and the following page. This category supports organizations that provide significant resources for two or more distinct artistic disciplines, e.g., dance and visual arts. *Organizations with a predominant discipline focus, but with ancillary activities in other artistic disciplines, should consult program staff before submitting an application.*

Be clear and concise and do not exceed three (3) pages single sided in answering questions 1.a through d, below, and 3.

1. **Payment to Artists— "Equitable Payment to Artists" is an established criterion; this information is very important.**

   a) Explain your organization's *current* policy regarding payment to artists. If there are plans for changes in this policy, please explain. If you have established a range of payments to artists, please explain the basis of the range. Limit your response to one-half page.

   b) Complete the following table as it pertains to your particular organization regarding payments to artists and ***artistic*** salaries by providing figures based on your last completed fiscal year.

Report Artistic Only				
Category	**Number of Individuals**	**Annual Salary**	**Hourly Wage**	**Honoraria/Fee**
Paid Staff–*Full-time*				
Paid Staff–*Part-time*				
Contracted				
Speakers/ Presenters' Fees				
Workshop Leaders				
Other				

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Discipline Page: Multi-Disciplinary Arts (Continued)

Attachments to the Application: The following materials should follow these discipline pages and be attached to your application on 8 1/2 by 11 inch paper. Be clear and concise and do not exceed three (3) single sided pages.

2. **Programs and Services:**

    a) Provide a schedule of programs and services (*current and planned*) for 1997-98 and 1998-99. You should provide dates, targeted audience, fee structure and admission figures where applicable.

    b) If applicable, describe the facility(ies) your organization uses for programming and/or presentations. Include name, location, and description of stage and seating capacity. If you have a diagram available showing the space, please attach.

3. **College or University Affiliation:** If your organization is affiliated with a college or university, summarize your relationship in the areas of governance, finance, staffing, student and community participation and public accessibility.

4. **Supplementary Materials:** Collate into *three (3) identical sets* no more than three separate examples of your *current* (within the past two years) promotional materials, such as brochures, programs of public events, etc., and include as part of your application package.

5. **Work Samples:** You are strongly urged to submit a sample of recent artistic work. Your sample can be in slides (10 maximum, see following log form), video tape (VHS), **or** audio cassette tape. It is strongly recommended that you do **not** submit a combination of mediums (e.g., slides and video tape) as the **maximum** viewing or listening time is five minutes. If tape is longer, cue to the desired material; without your direction, the panel will randomly see/hear segments of your work that may not be to your advantage. Audiovisual materials should include samples of work from each artistic discipline with which your organization is involved.

Artist	Title of Work	Medium	Dimensions	Year

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Discipline Page: Multi-Disciplinary Arts (Continued)

Video Tape Sample Log.

If applicable, fill out log and attach to your application. Total viewing time cannot exceed five minutes; cue tape(s) if necessary. Label tape and case with the following information:

Title and Brief Description of Work	Producer/ Director	Date and Location of Production	Featured Artist(s)	Length of Tape (indicate VHS or 3/4")
Tape #1				
Tape #2				

Audio Tape Sample Log.

If applicable, fill out log and attach to your application. Total listening time cannot exceed five minutes; cue tape(s) if necessary. Label tape and case with the following information:

Title and Brief Description of Work	Producer	Date and Location of Production	Featured Artist(s)	Length of Tape
Tape #1				
Tape #2				

Be sure to include return package with adequate postage if you wish work samples to be returned.

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Discipline Page: Music Organizations

Important Information for Music Applicants: In the left hand column below, identify your organization type relative to this proposal. For example, a school requesting support for its training program should follow directions for Training Centers, but a school requesting support for a presenting series should follow directions for Presenting Organizations. Read across to determine required submissions.

Organization Type	Discipline Page and/or Supplement Required	Tapes	Promotional Materials (Brochures, Programs, etc.)
Performing Groups	Music Performing Groups pages 34 and 35	Required: 8 Audio	3 Identical Sets
Presenting Organizations pages 36 and 37	Presenter Organizations or VHS video	Required: 8 Audio	3 Identical Sets
Music Festivals	Presenter Organizations Pages 36 and 37	Required: 8 Audio	3 Identical Sets
Training Centers (Schools, Music Camps)	Arts Training Supplement Page 47	Required: 8 Audio or VHS Video	3 Identical Sets
Performing Groups (Youth)	Music Performing Groups Pages 34 and 35, if applicable	Required: 8 Audio	3 Identical Sets
	Arts Training Supplement	Required: 8 Audio or VHS Video highlighting training	3 Identical Sets
In-School Presenters	Arts Education Supplement Pages 45-46	Optional: 8 Audio or VHS Video	3 Identical Sets
Music Service	Arts Service Organizations Pages 20-21	Optional: 8 Audio or VHS Video	

Tape preparation and Labeling: All organizations submitting tape must complete tape log on page 32-A. The artistic excellence of music presentations as demonstrated by sample audio or video materials submitted with the application is the primary criterion in the panel's evaluation of your application. **THIS IS A HIGHLY COMPETITIVE PROGRAM, IT IS YOUR RESPONSIBILITY TO ENSURE THAT THE AUDIO MATERIALS SUBMITTED ARE OF THE HIGHEST POSSIBLE ARTISTIC EXCELLENCE AND AUDIO QUALITY.**

NOTE: The artistic director, music director, or someone with substantial musical knowledge and authority in your organization should review audio materials before they are sent to the California Arts Council.

- Audio cassettes submitted should be 1/4 inch high bias chrome or metal. Note on the cassette whether or not you have used a noise reduction system and indicate what kind. **Do not duplicate any cassettes that were submitted with any previous applications.** The tape must be a live public performance from a recent session (within the past year). The material should be recorded on one side only, totaling not less than 15 minutes and not more than 45 minutes. **IF YOU DO NOT HAVE A RECENT TAPE, CONTACT THE OSP MUSIC**

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Discipline Page: Music Organizations (Continued)

Tape Preparation and Labeling (Continued)

Performing Groups, Presenting Organizations, Music Festivals:
- Include a representative and contrasting range of selections.
- Entire compositions need not be included. Sections or movements are acceptable, but there must be no fade-outs, post-recording edits, or cutoff to interrupt the music.
- Where possible, reduce the length of the applause, verbal commentary, etc.
- Orchestras, special instruction: If desired, one concerto or vocal selection may be included, but the bulk of the tape must come from the orchestral repertory.
- Choruses, special instruction: Include at least one unaccompanied selection.
- Opera companies, special instruction: All opera companies must submit video tape(s). Include selections to highlight ensemble work, featured singers, staging, and orchestra. You may also document your artistic quality through the addition of an audiotape.

Training Organizations, Youth Performing Groups:
- Submit a sample of coaching or rehearsal in addition to live performances.
- If your program divides students by progressive levels or age groups (e.g., beginning, intermediate, etc.) represent each training group by one selection, if possible.

In-School Presenters:
- If appropriate, include sample of verbal remarks from artists or teachers introducing the works performed.

Tape Log:
- To be completed by applicants in the Music Performing Groups/Presenting, Festivals, Services, and Training category.

The artistic director, music director, or someone with extensive musical knowledge and authority in your organization should review your audio materials BEFORE they are sent to the California Arts Council. That individual must sign below authorizing the submission of audio materials.

By signing here, you verify that the audio materials have been reviewed and authorize their inclusion with this grant request:

Signature: _____   **Print Name & Title:** _____

Tape counter should be set at "000" for first selection to be reviewed. All other selections to be reviewed should be referenced from that point: i.e., selection "1" begins at "000," selection "2" begins at "032, etc.

	Title of Work	Composer	Date & Location	Featured Artist(s) of Performance	Tape Counter
1					**000**
2					
3					
4					
5					
6					
7					
8					

Be sure to include return package with adequate postage if you wish work samples to be returned.

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Discipline Page: Music Organizations (Continued)

SPECIALIST IMMEDIATELY!

- Place the selection(s) that you would like reviewed in priority order at the beginning of the tape.
- Leave a blank section of from 4 to 5 seconds between selections to facilitate cueing, during the review process.
- Label each cassette tape or videotape and outer box with your organization name.
- Compact discs (CDs) are acceptable only if they are of live public performances. Indicate track number in order of priority in which you would like the material reviewed.

College or University Affiliation: If your organization is affiliated with a college or university, summarize on a separate page your relationship in the areas of governance, finance, staffing, student and community participation, and public accessibility. (Limit your response to a half page.)

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Discipline Page: Music Performing Groups

To this page attach a copy of an artistic vision statement from your artistic director/musical director.

To this page attach separate listings of your organization's programs/activities for 1997-98 and 1998-99 (maximum two pages) using the following headings:

<u>Title Composer:</u>   <u>Venue:</u>   <u>Guest Artists:</u>   <u>Conductor:</u>

1. **Payment to Artists:** *Equitable payment to artists is an established criterion of the program.* It is very important that you answer the following questions completely.

   a) Explain your organization's current policy regarding payment to artists. If there are plans for changes to this policy, please include in your explanation. If you have established a range of payments to artists, please explain the basis of the range. Please adhere to the space provided.

   b) Complete the following table as it pertains to your particular organization by providing dollar amounts and/or a range of payments. Indicate union scale payments—if applicable.

Category	Per Performance	Per Rehearsal	Union Rate
Instrumentalist			
Vocalist			
Dancer			
Other (define below)			

Other:

2. Explain your policy regarding rehearsals, i.e., how often, for what periods of time, full ensemble versus sectionals, etc.

3. **Performance/presentation information:** Complete only those sections applicable to your organization.

	1996-97		1997-98		1998-99	
	Price range	Number	Price Range	Number	Price Range	Number
Subscription	$_____	_____	$_____	_____	$_____	_____
Individual	$_____	_____	$_____	_____	$_____	_____
Total Number of Productions		_____		_____		_____
Total Number of Performances	_____		_____		_____	

4. List and briefly describe the major programs and/or services of your organization.

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Discipline Page: Music Performing Groups (Continued)

5. **Education/outreach activities:** If your organization provides education or outreach programs, list the number of *projects* completed in each category, and the total number of persons served.

	Past Year 1996-97	Current Year 1997-98	Estimated 1998-99
Schools	_____	_____	_____
Community Sites	_____	_____	_____
Institutional Sites	_____	_____	_____
Total Persons Served*	_____	_____	_____

* Note: Totals on this line should match totals on page 9, section "C."

College or University Affiliation: If your organization is affiliated with a college or university, summarize on a special page your relationship in the areas of governance, finance, student and community participation, and public accessibility. (Limit your response to a half page.)

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Discipline Page: Presenter Organizations

All Arts Presenter Organizations should complete the requirements on this and the following page. If your organization presents more than one discipline—is *not* single discipline specific—you should submit your application to the ASO/P category by the postmarked deadline of February 2, 1998. However, if your organization is single discipline specific, you should answer the following questions and submit your application to the appropriate artistic discipline by the deadline indicated on page iii.

Presenting organizations will be more competitive if they adhere to the following definition: A *presenting organization* demonstrates creative leadership by exercising a curatorial approach to programming that serves and enhances the artistic growth of the community. Presenting organizations provide performance opportunities necessary to the development of audiences and a variety of residency and educational activities throughout their communities. Their programming can reflect their communities' interests as well as help expand appreciation of diverse art forms. For purposes of the Organization Support Program, *a presenting organization is distinguished from a producing organization.*

Presenters manage all the presentational details: selects, engages, and pays a fee to artists and companies to perform, handles the contractual arrangements, technical requirements, personnel, box office, publicity, and ushers. Some presenters also house resident companies for which they provide services and audiences.

Producers (such as a dance company, music ensemble, or theater company) are responsible for the creation of the artistic work and the assembly of the artistic elements of a production. However, presenting organizations may work with creative artists in the commissioning and presenting of new work. "Commissioning" involves a presenter's commitment to the development of a new work often in close collaboration with an artist or arts ensemble. Responsibility for the creation of the work rests with the creative artist(s).

Be clear and concise and do not exceed three (3) pages single sided in answering questions 1.a), 2.a) through d), and 3.

1. **Payment to Artists— "Equitable Payment to Artists" is an established criterion; this information is very important.**

   a) Explain your organization's **current** policy regarding payment to artists. If there are plans for changes in this policy, please explain. If you have established a range of payments to artists, please explain the basis of the range. If applicable, explain your policy regarding ownership rights for work produced at your facility.

   b) Complete the following table as it pertains to your particular organization regarding payments to artists and **artistic** salaries by providing figures based on your last completed fiscal year.

Report Artistic Only				
Category	**Number of Individuals**	**Annual Salary**	**Hourly Wage**	**Honoraria/Fee**
Paid Staff–*Full-time*				
Paid Staff–*Part-time*				
Contracted				
Speakers/ Presenters' Fees				
Workshop Leaders				
Other				

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Discipline Page: Presenter Organizations (Continued)

Attachments to the Application: The following materials should follow these discipline pages and be attached to your application on 8 1/2 by 11 inch paper. Be clear and concise and do not exceed three (3) single sided pages.

2. **Programs and Services:**

   a) Provide a schedule of programs and services (*current and planned*) for 1997-98 and 1998-99. You should provide dates, targeted audience, fee structure and admission figures where applicable.

   b) Explain your process and selection criteria for choosing artists to present.

   c) Describe the facility(ies) your organization uses for presentation. Include name, location, and description of stage and seating capacity. If you have a diagram available, please attach.

   d) Summarize the history of your support of California artists.

3. **College or University Affiliation:** If your organization is affiliated with a college or university, summarize your relationship in the areas of governance, finance, staffing, student and community participation and public accessibility.

4. **Supplementary Materials:** Collate into *three (3) identical sets* no more than three separate examples of your current (within the past two years) promotional materials, such as brochures, programs of public events, etc., and include as part of your application package.

5. **Video Work Sample:** Include with the package a video sample of *live performance(s) your organization has presented in the past two years. Total running time is not to exceed five minutes.* The video should represent the range of artistic quality of what you present and the quality of the presentation. Special effects, dissolves, superimposition, etc. are highly discouraged. Use the form below to provide a log of the taped contents.

Artist	Title of Work	Date Performed	Length of Excerpt

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Discipline Page: Theater Organizations

Community programs, such as community theater, children's theater, and training programs will have stronger applications if they clearly establish to what extent the organization emphasizes professional artistic quality. Programs that stress recreation or therapy values may not be competitive. Community and pre-professional training programs should detail the extent and impact of their services to the community. Quality will be assessed by qualifications of training staff, critical reviews of performances, support letters, placement records of graduates, video sample, etc.

College or University Affiliation: If your organization is affiliated with a college or university, summarize on a separate page your relationship in the areas of governance, finance, staffing, student and community participation, and public accessibility. (Limit your response to one-half page.)

Theater Service Organizations should submit Arts Services Organizations Discipline page (pages 20-21) and attachments.
Theater Training Organizations should submit the Arts Training Supplement (page 47) and attachments.
Theater Organizations with training components should submit brief faculty biographies on a separate page and place it behind the Staff: Artistic and Administrative page (see page 11).
Theater Organizations that develop new work should submit brief playwright biographies and a summary description of the play development process on a separate page and place it behind the Artistic Direction Statement (for guidence, see page 39, No. 5).

1. **Payment to Artists:**

   a) Briefly state your organization's current policy regarding payment to artists. If there are plans for changes in this policy, please explain. Include union contract designation if possible.

	1996-97	1997-98	1998-99	1999-2000

   b) Total payments to artists: $_____ $_____ $_____ $_____
   Figures should include all per diem, honoraria, rehearsal pay, housing, taxes and benefits.
   Figures should equal total of line 18 "a" and "b" from each column of page 13.

   c) Total payment to actors: $_____ $_____ $_____ $_____
   Figures should include all per diem, honoraria, rehearsal pay, housing, taxes and benefits.

   d) Show numbers of actors/performers in the pay rate categories below. Categories should include all per diem, honoraria, rehearsal pay, salaries, and housing, taxes and benefits prorated on a weekly basis. Write number in applicable box and fill in every box.

   Weekly Pay

	$0	$1-$50	$51-$150	$151-$250	Over $250
Number of Actors 1996-97					
Number of Actors 1997-98					

2. Describe the theater facilities including seating capacity, square footage, etc.

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Discipline Page: Theater Organizations (Continued)

3. If an event was brought in, indicate it with an asterisk. Indicate a co-production with two asterisks. Indicate the number of public performances on the "Title" line between parentheses. Indicate a world premiere by circling the number on the "Title" line.

1996-97 SEASON

Artistic Director _____

Title	1 _____ ( )	4 _____ ( )	7 _____ ( )
Author	_____	_____	_____
Director	_____	_____	_____
Title	2 _____ ( )	5 _____ ( )	8 _____ ( )
Author	_____	_____	_____
Director	_____	_____	_____
Title	3 _____ ( )	6 _____ ( )	9 _____ ( )
Author	_____	_____	_____
Director	_____	_____	_____

1997-98 SEASON

Artistic Director _____

Title	1 _____ ( )	4 _____ ( )	7 _____ ( )
Author	_____	_____	_____
Director	_____	_____	_____
Title	2 _____ ( )	5 _____ ( )	8 _____ ( )
Author	_____	_____	_____
Director	_____	_____	_____
Title	3 _____ ( )	6 _____ ( )	9 _____ ( )
Author	_____	_____	_____
Director	_____	_____	_____

1998-99 SEASON

Artistic Director _____

Title	1 _____ ( )	4 _____ ( )	7 _____ ( )
Author	_____	_____	_____
Director	_____	_____	_____
Title	2 _____ ( )	5 _____ ( )	8 _____ ( )
Author	_____	_____	_____
Director	_____	_____	_____
Title	3 _____ ( )	6 _____ ( )	9 _____ ( )
Author	_____	_____	_____
Director	_____	_____	_____

4. Attach to the application, directly following this Discipline Page for Theater Organizations, a list of other activities for the 1997-98 and 1998-99 seasons (maximum two pages) such as readings, workshops, education, or outreach programs. If these require membership, detail all requirements and costs.

5. Provide an artistic direction statement (two-page limit). A strong statement focuses on your artistic mission and an appraisal of the artistic achievements of your current or planned work. Co-productions should be addressed in terms of artistic control.

6. Collate into 4 identical sets, no more than three samples of current promotional materials such as season brochures, programs, etc.

7. Applicants must send a videotape, photos, or slides. Include a full description of the sample.

Be sure to include return package with adequate postage if you wish work samples and promotional materials returned.

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Discipline Page: Visual Arts

In addition to this page, visual arts organizations that engage in arts education programming should submit the Arts Education Organizations Supplement (page 45) and its required attachments.

Note the following CAC policy adopted in 1989: "It is not appropriate to use a museum collection to pay for the costs of or to serve as collateral for operating and/or capital expenditures." Be aware that compliance with this policy will be reviewed in the assessment of your application.

1. **Payment to Artists —"Equitable Payment to Artists" is an established criterion of the program. It is very important that you answer the following questions completely.**

    a) Explain your organization's *current* policy regarding payment to artists. If there are plans for changes in this policy, please include in your explanation. If you have established a range of payment to artists, please explain the basis of the range. Please adhere to the space provided.

    b) Complete the following table as it pertains to your organization regarding payment to artists and ***artistic*** salaries for the last completed fiscal year. Provide **rate and/or range of payments** as appropriate to each category. **REPORT PAYMENT TO ARTISTIC PERSONNEL ONLY.**

Report Artistic Only						
Category	**Number of Individuals**	**Annual Salary**	**Hourly Wage**	**Honoraria/ Fee**	**Gallery Sales**	**Auction**
Paid Staff–*Full-time*						
Paid Staff–*Part-time*						
Exhibiting Artist						
Lecturer/ Speaker						
Teacher/Workshop Leader						
Other: _____						

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Discipline Page: Visual Arts (Continued)

2. **Artistic Involvement:** Discuss the involvement of artists on the organization's staff, board, and/or advisory committees. Adhere to the space provided.

3. **Public Access:** What days and hours is the organization open to the public? What is the admissions policy? If affiliated with a college or university, specify whether or not public access is available beyond the academic year. Adhere to the space provided.

4. **Collection Management:** For organizations that maintain a collection(s), describe your organization's collection management policies, including accession and deaccession policies, maintenance, and conservation. Adhere to the space provided.

5. **Exhibition Facility:** In the space provided, briefly describe your organization's exhibition facility. If a diagram is available, attach a copy to this page.

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Discipline Page: Visual Arts (Continued)

6. **Artistic Director's Statement:** Attach to this page a one-page statement from your organization's artistic director discussing the artistic vision of the organization.

7. **Programs and Services:** Provide a schedule of programs, activities, exhibitions, and services (current and planned) for 1997-98 and 1998-99. Indicate dates, targeted audience, fee structure and admission figures where applicable. Be clear and concise and do not exceed two pages.

8. **College or University Affiliation:** If your organization is affiliated with a college or university, summarize on a separate page your relationship in the areas of governance, finance, staffing, student and community participation, and public accessibility. Limit your response to a half page.

9. **Supplemental Materials:** If appropriate, include the following materials with the application:

    Catalogs, no more than three (3) examples, four (4) copies each. Include samples funded by the CAC from last year's grant. Other examples should be no more than two years old.

    Promotional materials, such as brochures, programs, and posters, collated into three (3) identical sets with no more than three (3) examples per set. Examples should be no more than two years old.

    Work samples documenting artistic programming in the form of slides or video. If submitting slides, include no fewer than 10 and no more than 20. Slides should document the organization's permanent collection and/or exhibitions that occurred within the last two years or are proposed during the grant year. Mounts should be numbered and marked with the name of artist, title of work, medium, dimension, and year of execution. Include slides of installation views if possible. Complete the slide inventory form.

    If submitting video, documentation should be no more than two years old. Select five minutes of material. If the tape is longer, cue the tape to the desired material. Complete the video descriptive information form.

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Discipline Page: Visual Arts (Continued)

Slide inventory:

	Artist	Title of Work	Medium	Dimensions	Year
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

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Discipline Page: Visual Arts (Continued)

Description of Video Tape:

1. Name of artist(s) and/or group represented in sample:

2. Title of work, site, and date:

3. Brief description of work:

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Discipline Page: Arts Education Organizations

All Arts Education Organizations should complete the requirements on this and the following page. If your arts education organization serves more than one discipline—is *not* single discipline specific—you should submit your application to the ASO/P category by the postmarked deadline of February 2, 1998. However, if your organization is single discipline specific, you should answer the following questions and submit your application to the appropriate artistic discipline by the deadline indicated on page iii.

1. **Payment to Artists— "Equitable Payment to Artists" is an established criterion; this information is very important.**

   a) Explain your organization's *current* policy regarding payment to artists. If there are plans for changes in this policy, please explain. If you have established a range of payments to artists, please explain the basis of the range. Please adhere to the space provided.

   b) Complete the following table as it pertains to your particular organization regarding payments to artists and *artistic* salaries by providing figures based on your last completed fiscal year.

Report Artistic Only				
Category	**Number of Individuals**	**Annual Salary**	**Hourly Wage**	**Honoraria/Fee**
Paid Staff–*Full-time*				
Paid Staff–*Part-time*				
Contracted				
Speakers/ Presenters' Fees				
Workshop Leaders				
Other				

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Discipline Page: Arts Education Organizations (Continued)

Be clear and concise and do not exceed three (3) pages single sided in answering questions 2 and 3, below.

2. **Programs and Services:**

    a) Provide a schedule of programs and services (current and planned) for 1997-98 and 1998-99. You should provide dates, brief description of targeted audience, fee structure and admission figures where applicable.

    b) Explain the audition process and selection criteria for choosing roster artists and guests to participate in your program.

    c) Explain how roster artists are trained, supervised, and evaluated.

    d) Explain, if applicable, how schools support your program.

3. **College or University Affiliation:** If your organization is affiliated with a college or university, summarize your relationship in the areas of governance, finance, staffing, student and community participation, and public accessibility.

4. **Attachments to the Application:** The following materials (on 8 1/2 x 11 inch paper) should follow these discipline pages and be attached to your application:

    a) 1997-98 roster of artists or groups, accompanied by short biographies.

    b) List of artists or groups projected for 1998-99 roster (along with short biographies if not included in 1997-98).

    c) Copy of your organization's program evaluation form, if applicable.

    d) Presenters' Discipline page (page 36-37), if presenting is a sizable and significant part of your program.

5. **Supplementary Materials:** Collate into *three (3) identical sets* no more than three separate examples of your *current* (within the past two years) promotional materials, such as brochures, programs of public events, etc. and attach as part of your application program.

    Note: It is mandatory that arts education organizations also include three (3) copies of their curriculum materials (teachers' guides, etc.)

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Supplement: Arts Training Organizations

Arts Training Organizations should complete this page in addition to the appropriate artistic discipline page. Applications should be submitted by the appropriate artistic discipline deadline indicated on page iii. Consult with staff if you need clarification.

Note: Training Schools Budget Reporting—On Budget Summary Page (13) list tuition revenue only if the school is part of the nonprofit organizatin applying to the Organizational Support Program. List the amount the organization devotes to scholarships under "Other" Operating Expenses (line 26).

1. **Complete the following table:**

Instructors' Rate or Range of Payment (indicate if by class, term or year)	Number of Students Enrolled Per Year		Tuition Structure Per:		Number of Scholarships Awarded			
	1996-97	1997-98	Year	Term	1996-97		1997-98	
					Full	Partial	Full	Partial

2. **Respond to questions 1-3 in narrative form. Do not exceed three (3) pages single sided.**

   a) Explain how instructors are selected and evaluated.

   b) What communities does your student body represent?

   c) What performing or exhibiting opportunities exist for students in the program? Do students perform at all levels of the curriculum? (Distinguish between recitals and public concerts.)

   d) If there is a professional performing group associated with your organization, what opportunities exist for students to audition and/or interact with the group?

   e) If scholarship opportunities exist for students, explain the solicitation and selection process.

   f) Explain how your organization tracks its former students and evaluates the success of its training program. Provide a list of former students or company members who are currently performing/producing or who have in the past worked with other professional companies. This list should include the following information: Artist's name; dates (year(s)) performed or trained with your organization; professional company placed with and type of involvement.

3. **Briefly describe the facility(ies) your organization uses for:**

   a) Training: Include name, location, type of facility, and capacity of room(s).

   b) Performance: Include name, location, type of facility, seating capacity and description of stage. If available, include a diagram of the performance space.

4. **Attach to your application:**

   a) A list of course offerings and faculty list with short biographies. Do not exceed three (3) page single sided.

   b) If applicable, send one copy of your most current **Curriculum/Training Guide**.

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How to Package Your Application for Submission (See page iii for Discipline Deadlines)
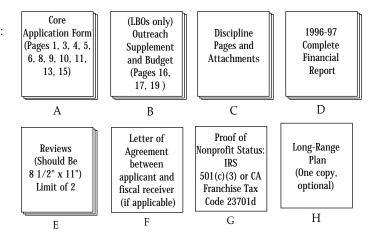
Send one signed original and eight (8) copies of application and attachments. Use clips or rubber bands to keep each set separate and intact.

Format: Application and attachment pages must be typewritten and clearly legible. Pages must be single-sided, 8 1/2" x 11"; oversized materials, newspaper clippings, and financial reports must be photocopied or laid out to fit this format. Remove all staples and bindings. Applications must be postmarked or hand-delivered by the deadline. There will be no exceptions.

Illustrated below is the order in which application and supplementary material must be assembled. Reproductions must be clear.

NOTE: To have audio or visual work samples returned, you must enclose a suitable mailing package with adequate postage.

Step 1. Gather Application Pages:

Core Application Form (Pages 1, 3, 4, 5, 6, 8, 9, 10, 11, 13, 15)	(LBOs only) Outreach Supplement and Budget (Pages 16, 17, 19)	Discipline Pages and Attachments	1996-97 Complete Financial Report
A	B	C	D
Reviews (Should Be 8 1/2" x 11") Limit of 2	Letter of Agreement between applicant and fiscal receiver (if applicable)	Proof of Nonprofit Status: IRS 501(c)(3) or CA Franchise Tax Code 23701d	Long-Range Plan (One copy, optional)
E	F	G	H

Step 2. Checklist for Assembling Complete Applications and Supplements; Late materials will not be accepted.

1.
- [ ] A Core Application Form
- [ ] B Outreach Supplement and Budget (LBOs only)
- [ ] C Discipline Page(s), Attachments
- [ ] D 1996-97 Complete Financial Statement
- [ ] E Recent reviews (limit of two, and photocopied to fit standard format)
- [ ] F Letter of Agreement between applicant and fiscal receiver (if applicable)

- [ ] G Copy of IRS 501(c)(3) proof of nonprofit status or California Franchise Tax Code 23701d.
- [ ] H Long-Range Plan (one copy, optional to be included with original copy)

2.
- [ ] Promotional materials (brochures, programs, etc.) three examples per set (see discipline pages for number of sets required)

3.
- [ ] Audio or Visual materials, with suitable mailing package and adequate postage for return

Original

1. Application: (A - H above) One signed original set, plus 8 photocopied sets. (single sided only)

2. Promotional Materials: See discipline pages to determine number of separately collated sets required for your discipline. Promotional materials must be attached to original application *and* copies.

3. Audio or Visual Materials: See discipline pages to determine materials and number required in your discipline. Provide appropriate description of materials.

Work Samples

CD

Copies

+

+

Packaging of work samples

California Arts Council

Organizational Support Program
1300 I Street, Suite 930
Sacramento, CA 95814

Check out the latest news!

In order to better serve you, we've increased the ways in which you can contact us:

Phone:	**916-322-6555**
Fax:	**916-322-6575**
Email:	**cac@cwo.com**
Web site:	**http://www.cac.ca.gov**

This application can also be found on our Web site and downloaded onto your printer. For more information, visit our Web site or contact Gay Carroll, Public Information Officer, at 916-322-6580 or email her at cac@cwo.com

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